

**Individual seeks Navigator services prior to completing their account (no partnership created)**

Once an individual has created a Washington Healthplanfinder account they have the ability to add a Navigator to their Dashboard to assist through initial enrollment and ongoing assistance. There will be many times when an individual comes to you for assistance without creating an account first.

When this happens the Navigator must complete the Create My Account and About You screens before a partnership can be created.

This is done by:

1. Logging into your dashboard
  2. From your Account Home page click on Start New Application
  3. Complete the Create My Account and About You Screens (see below)
  4. After completing these 2 screens click on your name at the top left hand corner of the screen. This will take you back to your dashboard
  5. Click on Find New Client's Account and fill in the required First Name, Last Name, SS# and DOB.
  6. Click on Search, find the client and click on select
  7. Complete the Confirmation to Partner with a Client screen (do this with the client present or with the client over the phone)
  8. Finish the application
- 
1. Logging into your dashboard




2. From your Account Home page click on Start New Application

Navigator Dashboard - Account Home Tab

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CUSTOMER SUPPORT



click, compare, covered.

Account Home | My Clients

Message Center

You have no notice at this time

Quick Links

Manage My Account

My Clients

Find New Client's Account

Start New Application

Print Paper Application

Renew Certification

Update Contact Information

Help Requests

Name	Comments	App Id	Contact Date	Phone	Status	Action
Alex Garcia		14659	11/14/2013		Draft	Accept

Item Found

3. Complete the Create My Account and About You Screens
4. After completing these 2 screens click on your name at the top left hand corner of the screen.

The image displays two screenshots of the Washington Healthplanfinder website. The left screenshot shows the 'Create My Account' screen. A red arrow points to the 'Sign Out' link in the top navigation bar. The 'Create My Account' screen includes sections for 'Account Information' (with fields for Username, Password, and Email Address), 'Security Questions' (with three questions and answer fields), and a 'User Acceptance Agreement' section. The right screenshot shows the 'About You' screen, which includes a progress bar at the top indicating steps: Browse, Apply, Select, and Finalize. The 'About You' section includes a 'Warning' box stating that the user must enter their full official name as on their social security card. Below this, there are fields for 'Social Security Number' and 'Date of Birth', followed by a 'Sex' selection (Male/Female) and a 'Who are you applying for?' dropdown menu.



**Add New Client**

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**washington healthplanfinder**  
click, compare, covered.

**Add New Client** \* REQUIRED FIELD

FIRST NAME *	LAST NAME
E.g. John	E.g. Smith
SOCIAL SECURITY NUMBER *	DATE OF BIRTH *
E.g. 123-45-6789	E.g. 01/20/2012
APPLICATION ID	
E.g. 654156	

Back Search

7. Find the client and click on select

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**Client Search Results**

First Name	Last Name	Date Of Birth	Application Id	Select
Shaine	Phelan	02/10/1986	2232	Select


Back


System Time: 04/08/2014 09:00:00 AM PST  
App Version: 1.1

System Time: 04/08/2014 09:00:00 AM PST  
App Version: 1.1

8. Complete the Confirmation to Partner with a Client screen (do this with the client present or with the client over the phone) and proceed to finish the application

## Confirmation to Partner with a Navigator

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click, compare, covered.

### Confirmation to Partner with a Client

You are about to become the Navigator for Alex Garcia. Please check the box below to indicate that you have reviewed the following terms with the client:

- Client agrees to disclose personal information, such as financial resources and family situation to a Program Navigator. Client understands the information will not be further disclosed without their permission.
- Client grants the Navigator permission to access, enter, and update information in their on-line application. Client further grants permission to the Navigator to submit their completed application, including activating an e-signature on their behalf.
- Client understands that they may end their partnership with the Navigator or change their duration or notification preferences at any time through their Healthplanfinder account or by calling 1-800-XXX-XXXX.
- Client grants permission to the Navigator to enter payment information in their on-line account. Client understands that the insurance premium they are quoted and that they accept will be charged to the account.

☐ Client understands and agrees to these terms. \*

WHAT SHOULD BE THE DURATION OF YOUR RELATIONSHIP WITH ALEX GARCIA? \*

☐ ONGOING

☐ FOR INITIAL APPLICATION ONLY

WOULD YOU LIKE TO RECEIVE COPIES OF ALL WASHINGTON HEALTHPLANFINDER NOTIFICATIONS SENT TO ALEX GARCIA? \*

☐ YES

☐ NO

To formally partner with this client, click "Partner" below.

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